



HR Shared Services: Moving from Planning to Implementation and Performance

Sponsored by  **Cornerstone**

April 30, 2020

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Chat ▼

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Webinar

Chat

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Enter your message

Send

Q & A

Don't forget to submit your questions to our presenters.

How? Click on the Chat box at the bottom left of your screen and be sure to click "send."



Webinar

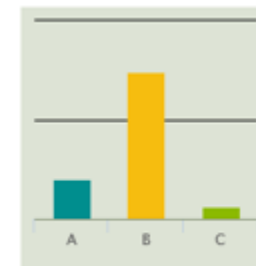
Poll Questions

Click on your screen in the box next to your answer choice.

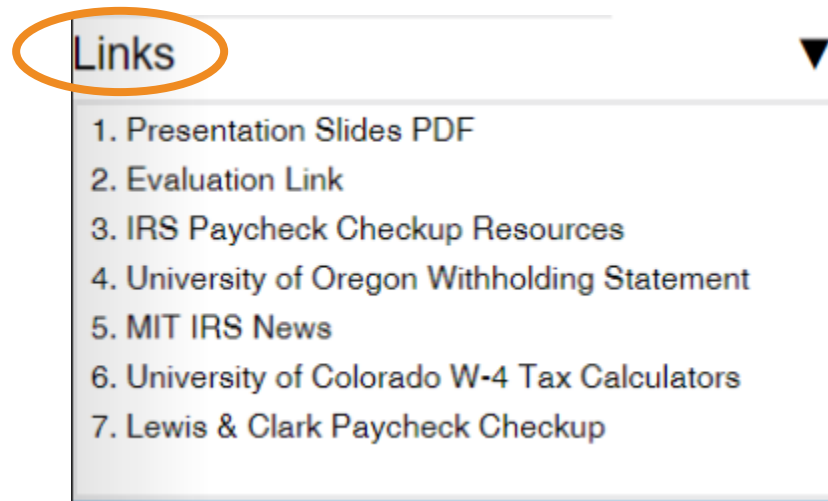
Poll Question

At which stage would you currently place your institution overall when it comes to most strategic decision-making?

- 20% - 1 A Reliant on gut, intuition, experience
- 74% - 19 B Data-informed
- 6% - 2 C Data-driven



Handouts



Available for download in the “Links” section of your dashboard.

Continuing Education Credit

Credit Hours for Webinars

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Questions? E-mail learn@cupahr.org.



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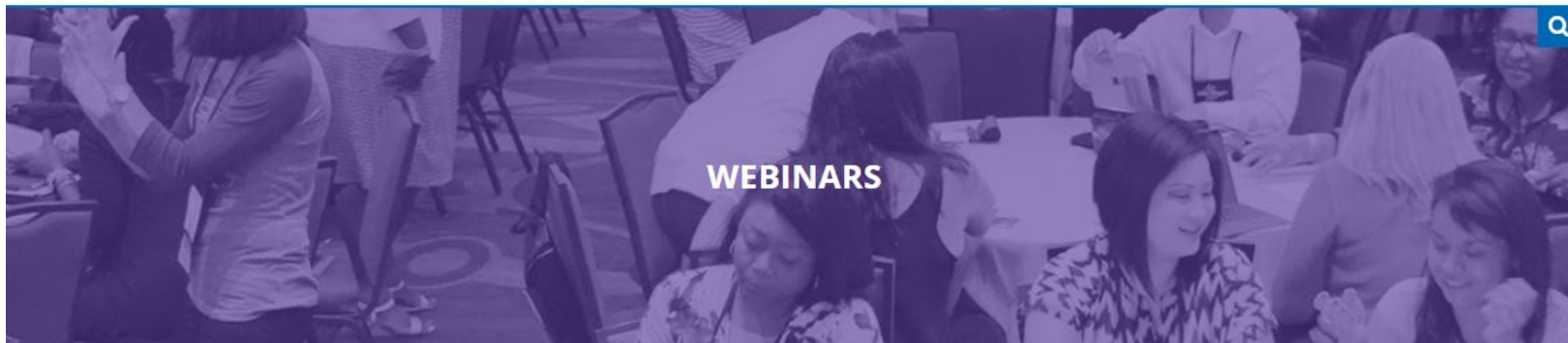
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The logo for Cornerstone consists of a blue square with a white circle inside, followed by the word "Cornerstone" in a bold, blue, sans-serif font.

April 30, 2020

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Presenters



Lauri Catalano

*Senior Director of Shared
Services*
Penn State University



Clint Eury

*Director of Administration and
Chief of Staff for Human
Resources*
Penn State University



Leanne Fuller

*Director of Human Resource
Services*
Auburn University



Ale Kennedy, Ed.D.

*Associate Chief Human
Resource Officer*
Clemson University

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Leanne Fuller

*Director of Human Resource
Services*



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Introduction

- Webinar
 - Part 2 of a Part 2 Series (First Webinar: October, 2019)

- A HR Shared Services model
 - Creates standardization of practices;
 - Streamline processes;
 - Ensure consistency of HR practices; to
 - Efficiently serve employees

- HR Shared Services in Higher Education
 - Various models
 - Dependent on your needs of your campus
 - Detailed planning and continuous improvement

Introduction (continued)

- What's next - Phases of shared services model operations
- Three institutions – different stages
 - Auburn University
 - Pennsylvania State University
 - Clemson University
- Panel Q & A
 - Send in your questions, via the chat feature, during the webinar

Poll Question

Have you implemented (or in the process of implementing) a HR shared services model at your institution?

a) Yes

b) No

Poll Question

Considering that you have either implemented or in the process, what phase are you currently in?

- a) Designing processes/functions
- b) Implementation of a software platform
- c) Communication planning and strategy
- d) Fully implemented shared services model
- e) Assessment and feedback for continuous improvement

About Auburn University



13,000
employees

*Full-time, part-time,
temporary, and student*



30,000+
students

*(19:1 student/faculty
ratio)*



1300+
New Hires per Year

Where Are We Now?

❑ Auburn University Onboarding Center

- Close to Full Operation
 - Open for Business
 - Employee Identification Cards fully functioning
- Finalizing software platform to onboard
- Fully staffed
- Building resources
 - Webpages
 - Welcome materials
 - Checklists and other informational items
- Go Live Plan (*date dependent on return to normal operations*)
 - Staff and Students
 - Faculty – Late Summer 2020



Onboarding Center Facility



- Approximately 1,500 square feet
- Two doors down from main HR office complex

Auburn University
onboarding
CENTER

cupa·hr™ Webinar



Lauri Catalano

Senior Director of Shared Services



Clint Eury


*Director of Administration and
Chief of Staff for Human
Resources*



PennState
Human Resources

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Agenda

- About Penn State
 - Communications/Marketing
 - Tools
 - Metrics
 - Relationship with HR Strategic Partners
- 

About Penn State

Pennsylvania's

- Sole land grant institution
- Largest public university
- One of the largest nongovernment employers



Operating budget
\$4.9 billion

Economic impact
\$2 billion



OPERATIONS



Hospital



Two Hotels



Airport

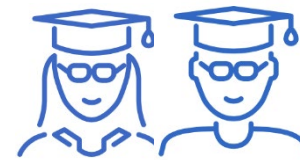


Two Law Schools



PennState

24 campuses
and online

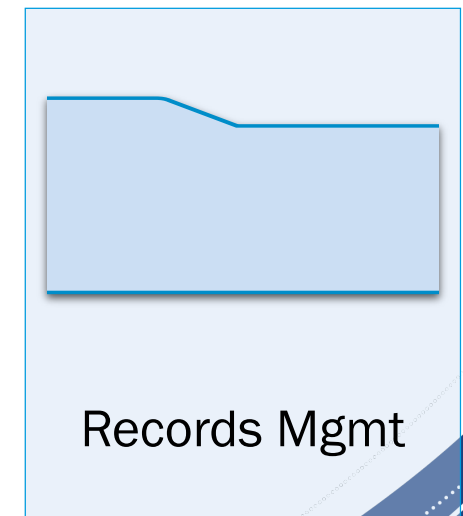
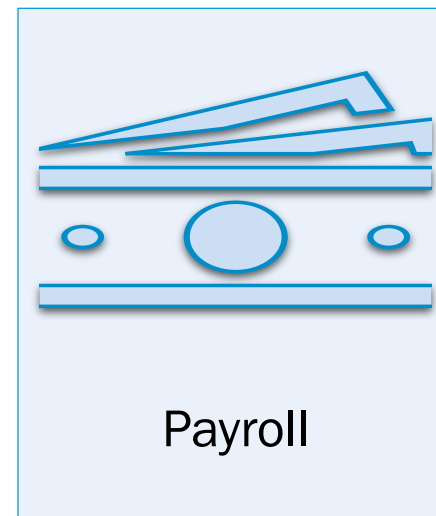
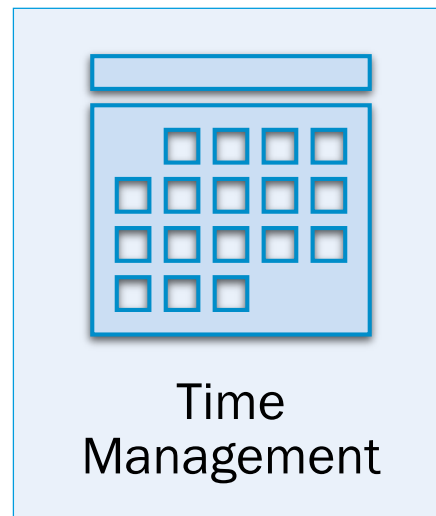
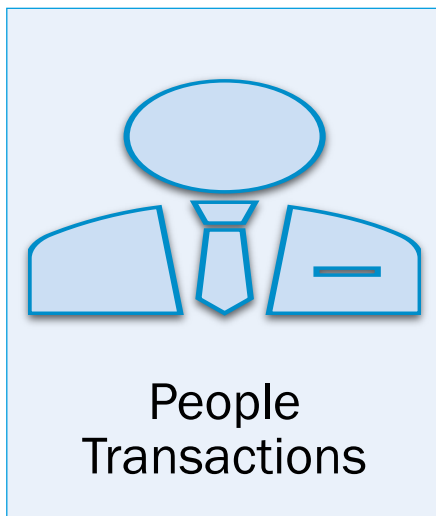
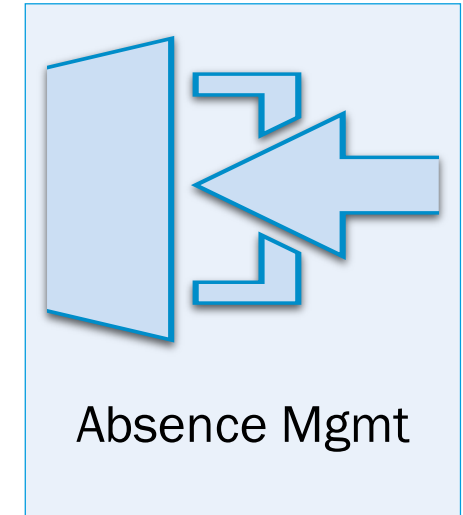
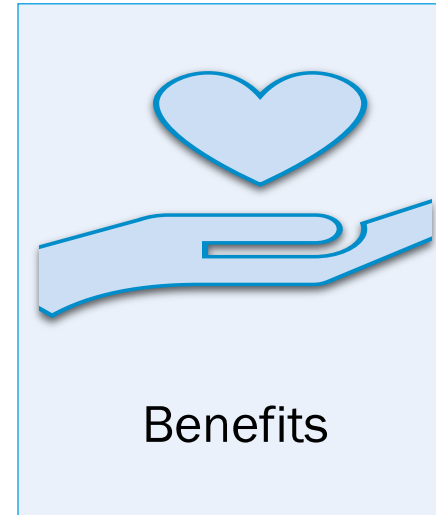
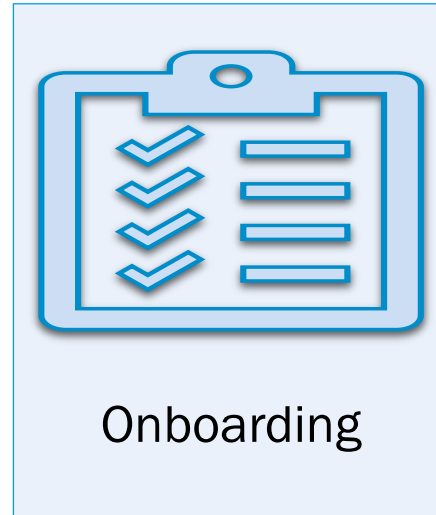


99,000
students

47,000
employees



Functions HR Shared Services Supports



Marketing & Communications

A decorative graphic in the bottom right corner of the slide. It features a solid dark blue curved shape that sweeps upwards and to the right. Overlaid on this is a white dotted line that follows a similar upward curve. A thin white line also runs parallel to the dotted line, creating a layered effect.

Poll Question

What communication vehicles have you/do you plan to use to deliver messages regarding your HR Shared Services organization? (Check all that apply)

- A. Fliers/Posters
- B. Image/Banners on Websites
- C. Social Media
- D. Emails/Articles
- E. System Notifications
- F. Other



Communications Vehicles

FLIER

- *Audience:* All employees
- 8.5x11 PDF version to print.
- Especially for those who don't have easy computer access



**PENN STATE
HUMAN RESOURCES**

INTRODUCING HR SHARED SERVICES

WHAT IS HR SHARED SERVICES?

HR Shared Services is a new University-wide approach to helping employees, retirees, and prospective employees with their HR needs.

HOW WILL HR SHARED SERVICES HELP ME?

HR will support the University in new and exciting ways, including improved customer service, streamlined processes, updated technology, and much more.

HOW CAN I CONTACT HR SHARED SERVICES?

Penn State employees can now contact HR Shared Services with any HR or payroll-related question through the following ways:

Email: AskHR@psu.edu Call: 814-865-1473

HR Shared Services is the new go-to, one-stop resource for HR support across the University. Instead of contacting unit-specific HR, employees should now first reach out to HR Shared Services with their HR and payroll-related questions.

When WorkLion launches later this year, employees will have even faster access to answers through Workday and self-service features.

 **PennState**
Human Resources

 **WorkLion**

Communications Vehicles

BIG 5 EMAIL

- *Audience:* All employees
- Used as part of a series of messages to build upon knowledge
- Highlight offerings of HR Shared Services

the BIG FIVE SPECIAL EDITION
JULY 2017

FIVE THINGS YOU NEED TO KNOW ABOUT PENN STATE'S NEW HR SHARED SERVICES

- 1** HR Shared Services has officially launched, providing Penn State employees the opportunity to ask any HR or payroll-related question by emailing AskHR@psu.edu or calling **814-865-1473**.
- 2** HR Shared Services staff are co-located in the James M. Elliott Building and the 331 Building in Innovation Park, while HR Strategic Partners and Consultants are located regionally and across the University Park campus.
- 3** Due to the realignment of HR support, new HR forms and processes will be phased in across the University and rolled out to hiring managers and administrative staff.
- 4** The new employee onboarding experience has been updated to better serve our new hires and appointees.
- 5** Additional updates will be distributed over the coming months in preparation of the WorkLion launch.

PennState
Human Resources

WorkLion

VISIT OHR.PSU.EDU TO LEARN MORE

Communications Vehicles

SOCIAL MEDIA IMAGE & WEBSITE BANNER IMAGE

- *Audience:* All employees
- Website Carousel
- Social Media
(HR team members, other partners)



Communications Vehicles

EMAILS/ARTICLES

- *Audience:*
 - *Penn State Today: All employees*
 - *News to Know: Varies (All or a subset)*
- News Articles – higher level and broader statement
- News to Know – targeted communications with detail and actions



Remote Onboarding

TK HR Strategic Partners and Sr Leadership <L-HRSPONLY@lists.psu.edu>
To: L-HRSPONLY@LISTS.PSU.EDU



Topic:
Remote Onboarding

Audience:
HRSPs
HRCs

Update:
Effective **Monday, March 23, 2020** onboarding for any new employee will be handled by the Data & Onboarding team via individualized Zoom sessions until further notice. The Data and Onboarding team will notify HRSPs and HRCs when we have a more accurate date as to when face-to-face onboarding can resume.

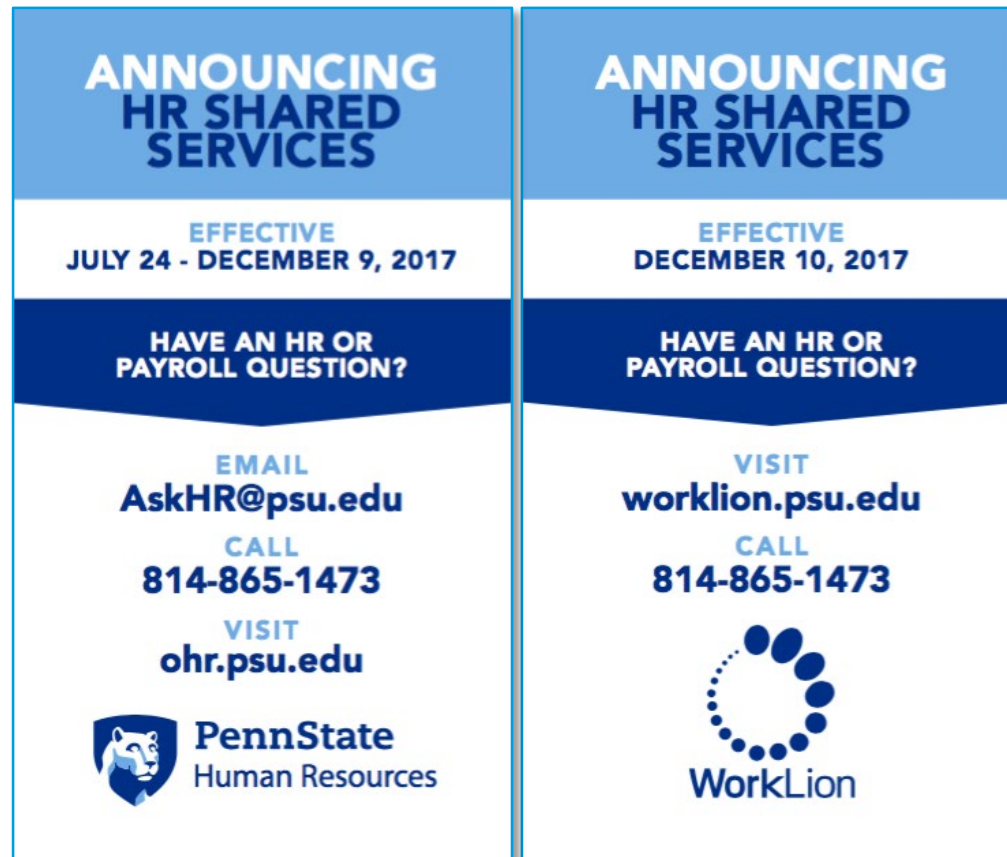
During the Zoom sessions, the employee will be provided the same information as our standard presentation, review and complete any outstanding electronic paperwork, and complete **Section 2 of Form I-9**. Additionally, content typically provided in a hard copy format will be emailed to the new employee.

Regarding the completion of Section 2 of Form I-9, the Department of Homeland Security (DHS) announced on Friday, March 20, 2020 that it will allow for flexibility in completing the Employment Eligibility Verification (Form I-9) for employers taking physical proximity precautions due to COVID-19. Therefore, employers will not be required to review the employee's identity and employment authorization documents in the employee's presence. The new DHS guidance defers the physical

Communications Vehicles

CONTACT CARDS

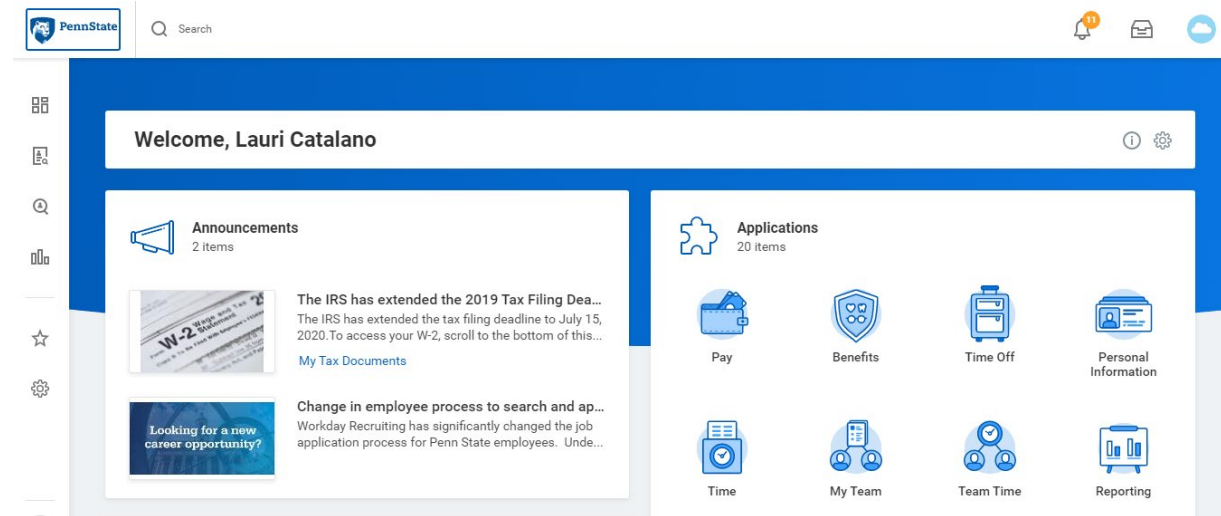
- *Audience:* All employees
- Business cards that HR Strategic Partners, HR Consultants, and others can hand out
- Meant to serve as a reminder
- Great for new hires



Communications – Notifications within Applications

Human Capital Mgmt System

- *Audience:* All employees
- Used for any “hot topics” that we want to get out to the end user community
- Real Time
- Keep content fresh



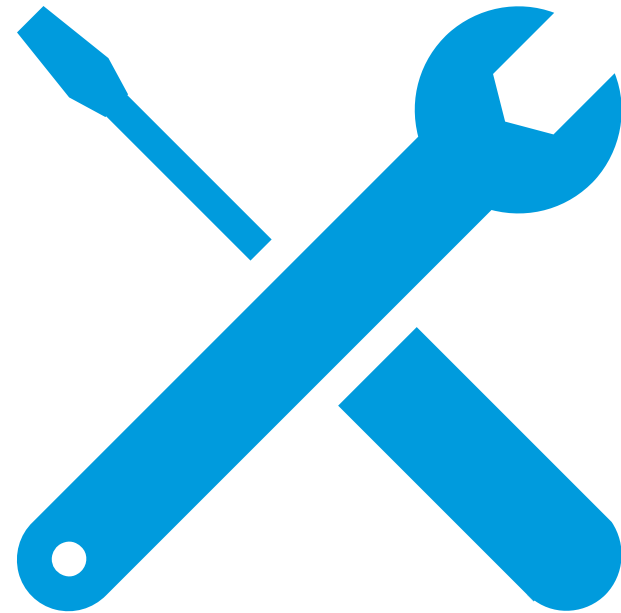
Tools



Poll Question

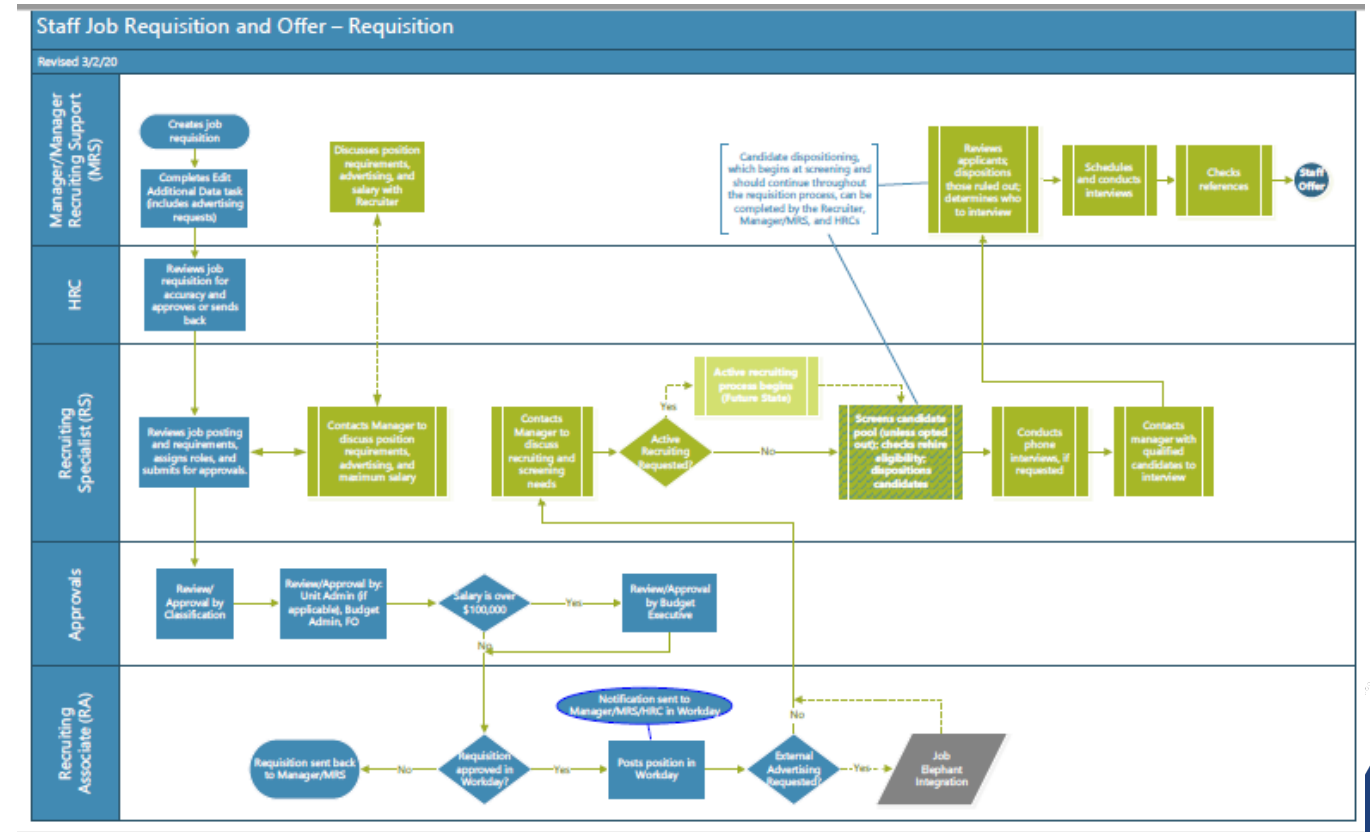
What tools have you developed to support the Shared Services organization? (Check all that apply)

- A. Workflow Diagrams
- B. Process Documents
- C. Templates
- D. Job Aids
- E. Forms
- F. Training Materials
- G. Knowledge Base Articles
- H. Other



Tools – Process Diagrams

- Shows the flow of the business process
- Really useful as a starting point when designing a new process
- Clearly identifies the players involved in the process
- Can be used to teaching new team members
- Can be used for troubleshooting issues



Tools – Process Documents

- Written explanation of the process diagrams
- Can be used for training new members
- Can be used to confirm that team member has taken all action steps
- Reference if a process does not occur frequently



HR Operations
Penn State Human Resources
The 331 Building, Suite 116
State College, PA 16802

FT1 & FTM Reappointment Process

Reappointment Report Processing and MPS Form Completion

- Data and Onboarding runs the reappointment report from Workday monthly to identify appointments ending in 60 days.
- D&O sends the report to HRCs on the fifth of the month in which the employee appointments are ending.
- HRCs send the reappointment spreadsheet back through the Request Compensation Form in Neocase with the initial spreadsheet attached. When submitting the form in Neocase, HRCs should add the comment "reappointments for (month)."
- D&O will add two additional fields, Reappointment Y/N and End date, for HRCs to fill out.
- D&O requests that the completed reappointment spreadsheet be returned no later than the fifth of the month following reception of the report. For example, D&O sends the reappointment list on April 5th for appointments ending in June, requesting the spreadsheet back May 5th
- Upon receiving the completed spreadsheet, D&O prepares all MPS forms and sends them to the HRCs for signature and tracking. At that time, D&O completes the business process (extension) in Workday.
- Once all signed MPS forms are returned to the HRC, **the HRC retains them.**

Tools – Job Aids

- For use by all HRSS team members
- A step by step set of actions to take for a given activity
- Often has screen shots of tools/systems
- A form of a checklist to ensure that team member is completing all steps and in the correct order
- Great for teaching new team members



Job Proofing Aid

Formatting, Language and Best Practices

Review job postings for consistency, including the following:

- Spelling, grammar and punctuation
- One space between sentences
- Identify and limit abbreviations, acronyms, buzzwords, jargon and Penn State specific terminology
 - If using an acronym, spell out the formal title when first referencing
 - Example: "The Applied Research Laboratory (ARL) at Penn State"
- When referring Penn State, it must be either "The Pennsylvania State University" or "Penn State"
- Use bullets and paragraphs
- Think clear, concise and transparent
- Campus Location vs. Additional Locations: H&FS at Behrend
- Dollar amounts should be written as \$10.00 vs \$10
- Time should be formatted as 1:00 p.m. – 5:00 p.m. vs 1-5 pm
- Verify qualifications. These should be in order of required, preferred, etc.
 - <https://hr.psu.edu/compensation-and-classification/job-profiles>
- Verify number of vacancies
- Jobs that require lifting: must include the statement 'with or without accommodation'
- Watch for posting end dates
- Diversity statements

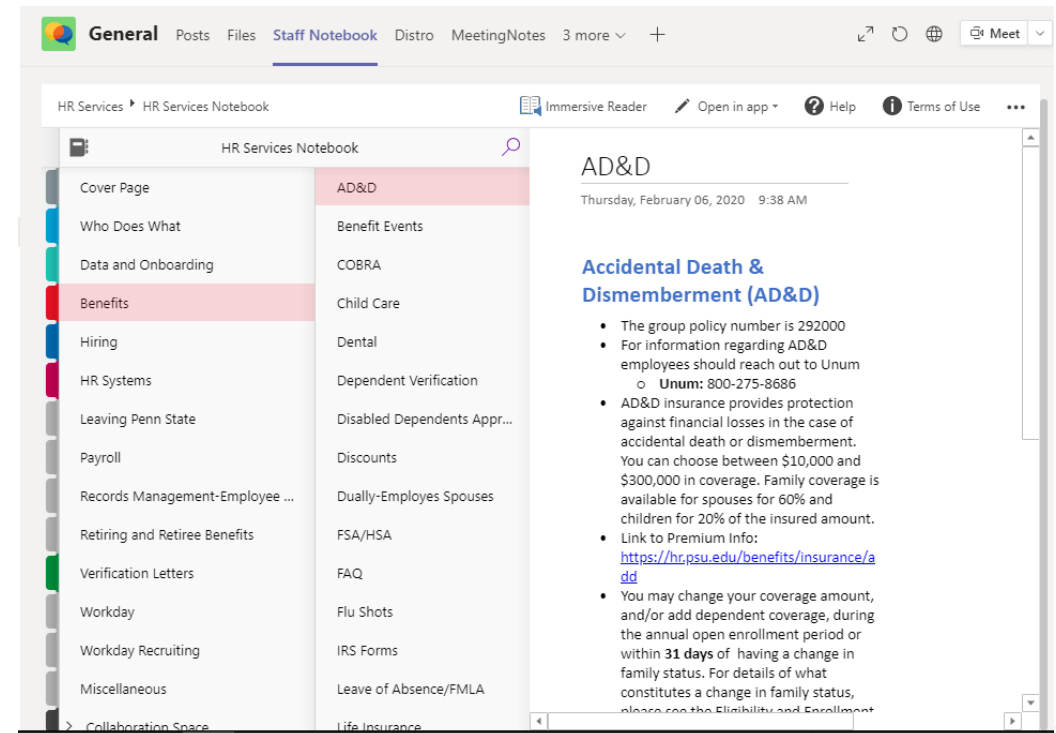
Tools – Knowledge Base

- Self Service Tool that is a component of our Case Management System
- Enables employees to search for answers to questions on their own
- Reduces Volumes to Call Center
- Needs constant maintenance

The screenshot shows the PennState Human Resources Knowledge Base website. At the top left is the PennState logo and the text "PennState Human Resources". Below this is a search bar with the word "Search" inside. A navigation bar contains links for "HOME", "KNOWLEDGE BASE", "HR TOOLS", "MANAGER TOOLS", and "CONTACT US". On the left side, there is a vertical list of categories, each with a folder icon and a right-pointing arrow. The categories are: Academic, Benefits, Compensation & Classification, Employee & Family Resources, Employment Verifications, HR Systems/Technology, Leaving/Retiring Penn State (highlighted in blue), Miscellaneous, Payroll, Performance Management, Recruiting/Hiring/Transferring, Talent Management/Workplace Learning, Time Off/Leaves of Absence, Time Tracking, Workers Compensation/Occupational Medicine, WorkLion Manager Tools, and Workplace Concerns. On the right side, there are two buttons: "Search Again" and "Submit an Inquiry". Below these buttons is the heading "List of Related Articles" followed by a list of article titles: Access Account Deactivation and Extension, Creditable Prescription Coverage, Ending Benefits, Ending Employment while on a Temporary Salary Increase, Resignation of Employees, Retiree Medical Coverage Options, Retirement Eligibility, Retirement Process, Retiring - FAQs, Transfer/Separation Checklist Completion Guidelines, Unused Sick Time, and Unused Vacation.

Tools – Internal Resource Guide

- For Call Center Team Members Reference
- Ensure consistency in responses
- Organized by Topics
- ‘Owned’ by Call Center Manager
- Essentially an internal knowledgebase



Metrics



Poll Question

What metrics are you currently utilizing? (Check all that apply)

- A. Transaction volumes
- B. Time to complete
- C. Audit/compliance activities
- D. Behavioral metrics
- E. Employee performance level metrics
- F. Other



Metrics

- Show Trends
 - Week over Week
 - Month over Month
 - Year over Year
- Workforce Planning - Enables You to Respond to Resource Needs

	DATA and ONBOARDING				HR SERVICES			
	Current Data				Current Data			
Week of	DO Created Records	Closed Records	Backlog Current Week	HRS Created Inquiries	Closed Inquiries	Backlog Current Week	Current Week	Calls Handled
1-Mar	999	862	86%	1004	584	58%	826	
8-Mar	866	915	106%	906	621	69%	820	
15-Mar	529	1018	192%	810	556	69%	575	
22-Mar	1015	819	81%	721	484	67%	592	
29-Mar	1225	967	79%	827	481	58%	591	
5-Apr	1187	1295	109%	656	506	77%	495	
13-Apr	1416	1648	116%	768	397	52%	618	

Key Partnerships



Key Partnerships

- HR Strategic Partners and HR Consultants
 - Bi-Weekly Meeting with entire group (100+)
 - Bi-Weekly Meeting the HRSP Leadership (6 people)
 - HR News To Know
 - Collaborative projects
- Internal IT or IT Vendors
 - Monthly planning meetings for systems enhancements/improvements
 - Weekly or bi-weekly status meetings
- Affirmative Action
- Office of General Council
- Compliance Office
- Faculty Affairs
- Global Programs (Internationals, Visas)
- Payroll & Finance



cupa·hr™ Webinar



Ale Kennedy, Ed.D.

*Associate Chief Human
Resource Officer*



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FORWARD

CLEMSON®
HUMAN RESOURCES

**TAKING HR TO
THE NEXT LEVEL**



Agenda

- About Clemson University
- Clemson Over the pas few years
- HR Forward Model
 - Roles /Responsibilities
 - ASK HR
- Change Management: Steps to the New Model
- Successes and Challenges

HR Support in 2019-20 ... By The Numbers

Clemson HR made tremendous progress in FY19 with a centralized restructure, the creation of an online employee dashboard with 5 year trends and real time metrics, innovative process and system enhancements, and more! We are on our way to becoming the #1 HR team in higher education!



147,461
#ClemsonWorks social
media interactions

10,683
staff, faculty and student
workers on payroll

996
employee referrals

132
international hires

21
new employee
orientation sessions

35,000
job applications

1,470
faculty and staff
trained

841
new hires

132
HR-led classroom
training sessions

17
spousal placements

27,323
employee transactions
processed

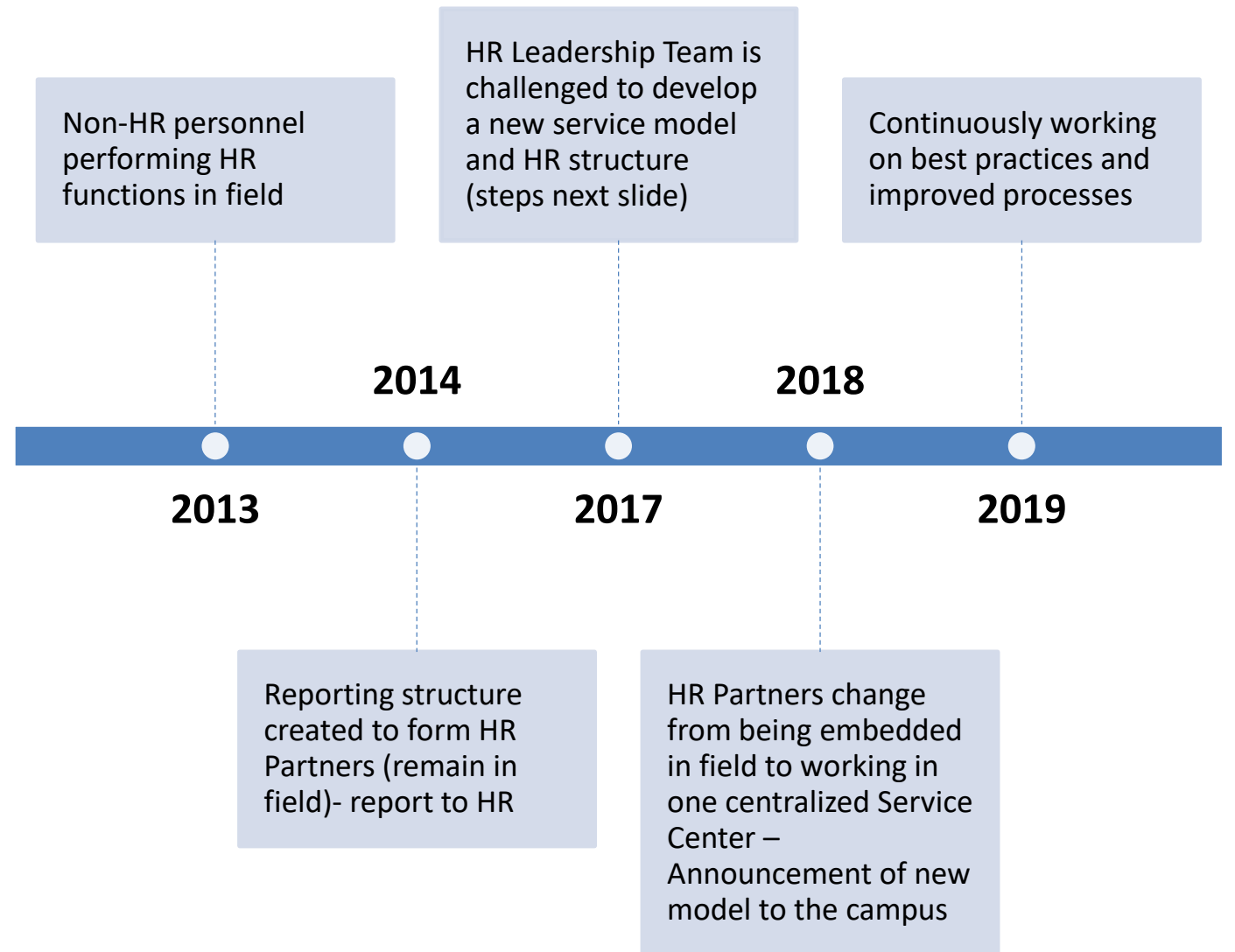
1,008
HR #ServeOthers
volunteer hours

562
supervisors attended
Supervisor Training

26
HR policies revised
and updated

11
new executive hires
and/or promotions

Clemson HR Over the Past 6 Years





The HR *Forward* Model

HR Service Center



Welcome to HR Services

Your Service team is a multifunctional group that has been designed to provide uninterrupted HR services to each college/division.

Primary Contacts

Your primary contacts (HR Generalist / Service Representative) are listed beside each college/division. Please use these primary contacts for the HR services that you may need.

Secondary Contacts

If your primary contacts are not available, you may contact any of the generalists/service representatives on your Service Team for assistance.

[View Examples of Services Provided](#)

Service Team 1

- Athletics
- College of Behavioral, Social and Health Sciences
- College of Education
- University Libraries



Rachel Burch
HR Generalist
rburch@clemsont.edu
[656.3362](tel:656.3362)



Kristy Snider
HR Generalist
klsnide@clemsont.edu
[656.3026](tel:656.3026)



Kristy Snider
HR Generalist
klsnide@clemsont.edu



Dr. Ale Kennedy
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alekenn@clemsont.edu
[656.9407](tel:656.9407)



Jamie Byrne
HR Solutions Director
(HR Generalists)
jbyrne@clemsont.edu
[656.9056](tel:656.9056)



Michelle Turner
HR Service Lead
(HR Service Reps)

HR Services - Leadership Contacts

Examples of Services Provided

Service Level 1: Self Service (transaction performed by the employee) ▾

Service Level 2: HR Service Representatives ▾

Service Level 3: HR Generalists ▾

Service Level 4: HR Strategic Consultant ▾



ASK HR

- The Service Reps answer many questions that come into HR.
- COEs put together FAQs and scripts to respond to questions.
- Service Reps are briefed and trained on new processes and communications that go out



Steps to the New Model

- Change management training for all HR team members
- Skill gap analysis
- Identify roles & responsibilities
- COE training for all HRSC team members
- Streamline and document processes
- Communication with campus leaders

After a year.....

Successes

- HRSC service teams
- Streamlining processes
- All of HR under one roof
- Training
- Establishing roles and responsibilities

Pain Points

- Time limitation to review all processes
- Campus understanding all of HR services and team roles
- COE and HRSC working in collaboration

A decorative graphic consisting of a vertical orange bar on the left side of the page and a horizontal purple line that spans the width of the page, intersecting the orange bar.

HRForward Next Steps

FORWARD

CLEMSON
HUMAN RESOURCES



Thank you!

Questions?



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lmc68@psu.edu



Clint Eury
cee126@psu.edu



Leanne Fuller
fullele@auburn.edu



Ale Kennedy, Ed.D.
alekenn@clemson.edu



CUPA-HR
Annual Conference and Expo

HR Shared Services: Implementing a Model at Your Institution

Attend our concurrent session at the annual conference!

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Thank You!

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April 30, 2020

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The logo for Cornerstone, featuring a blue square with a white circle inside, followed by the word "Cornerstone" in a bold, blue, sans-serif font.

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